Preparing for the 2021 Texas Public Libraries Annual Report

Valicia Greenwood, Library Data Coordinator

Library Development and Networking Division
Texas State Library and Archives Commission
November 9, 2021

The Annual Report and Library Accreditation

Texas Public Libraries Annual Report

Report Sections
- Financials
- Collections
- Services
- Pandemic response

Accreditation in the State Library System

Minimum Criteria
- Financials
- Collections
- Services
- Director

Consulting and Continuing Education

https://www.tsl.texas.gov/ld/workshops/index.html

Created by Eucalyp
from Noun Project

Created by Sumit Saengthong
from Noun Project

Texas Public Libraries Annual Report

- Collecting stats over 60 years
- Accrediting libraries since 1971
- IMLS data collected since 1988
- Current contact information
- Communication vehicle

Texas Public Libraries Annual Report

Access to Summer Reading Program materials at no cost

Eligible for E-Read Texas/SimplyE platform

Public Library Accreditation

Criteria from peers

Promote financial foundation and stability

Community assurance

Voluntary local decision

Benefits!

2022
MEMBER
Texas Library System
Accredited ✓
by the
Texas State Library and
Archives Commission

MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM

13 TAC §1.71 – §1.87

OFFICE of the SECRETARY of STATE

Texas Administrative Code

TITLE 13	CULTURAL RESOURCES
PART 1	TEXAS STATE LIBRARY AND ARCHIVES COMMISSION
CHAPTER 1	LIBRARY DEVELOPMENT
SUBCHAPTER C	MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM

Rules

§1.71	Definition of Population Served
§1.72	Public Library Service
§1.73	Public Library: Legal Establishment
§1.74	Local Operating Expenditures
§1.75	Nondiscrimination
§1.77	Public Library: Local Government Support
§1.79	Provisional Accreditation of Library
§1.80	Probational Accreditation of Library
§1.81	Quantitative Standards for Accreditation of Library
§1.82	Accreditation Based on Current Operating Budget
§1.83	Other Requirements
§1.84	Professional Librarian
§1.85	Annual Report
§1.86	Standards for Accreditation of Libraries Operated by Public School Districts, Institutions of Higher Education, Units of Local, State, or Federal Government, Accredited Non-Public Elementary or Secondary Schools, or Special or Research Libraries
§1.87	Emergency Waiver of Accreditation Criteria

http://tinyurl.com/TACaccreditation

HOME   TEXAS REGISTER   TEXAS ADMINISTRATIVE CODE   OPEN MEETINGS

MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM
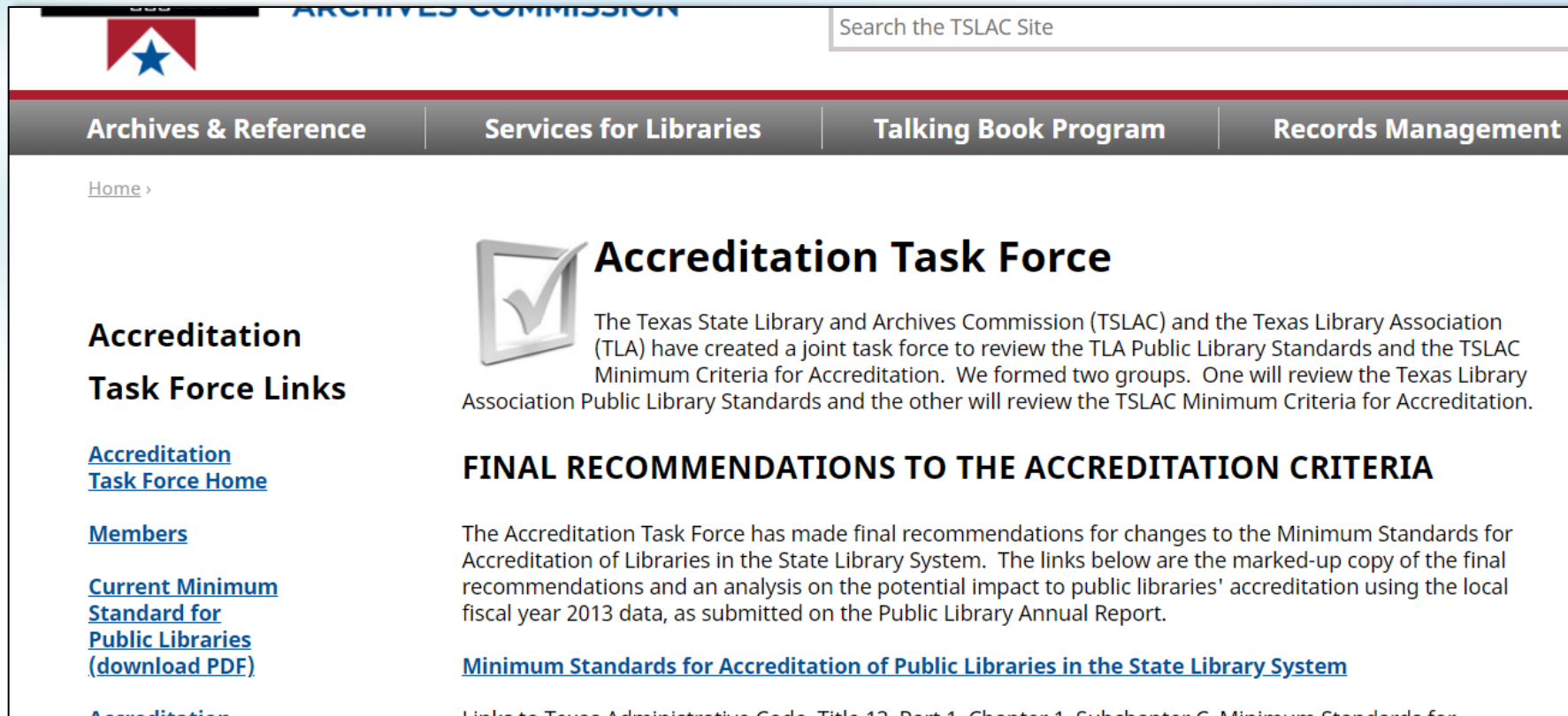
True minimums

- Minimum local operating expenditures
- Minimum per capita expenditures
- Minimum number of collection materials
- Minimum hours of employment, service hours
- Minimum number of professional librarians

Ignatsevichserg/pixabay

MINIMUM STANDARDS FOR ACCREDITATION OF LIBRARIES IN THE STATE LIBRARY SYSTEM

Peer developed - Reviewed every 7-10 years

Advertisement: Joint Task Force

Texas State Library and Archives Commission
TSLAC

Texas Library Association
TLA

Need representatives
- From libraries of all sizes, all types
- From rural, urban, all points of Texas and everything in between
- Some task force members work on accreditation revisions; some work on TLA Public Library Standards
- Commit to 1-2 years of research, thought and input

Benefits

Accredited Libraries

Interlibrary Loan (ILL)

https://www.tsl.texas.gov/landing/ill.html

E-Rate

- Federal Communication Commission (FCC) discount program

- Covers Internet, broadband costs

- Assistance with application process available

https://www.tsl.texas.gov/ld/tech

**E-rate Discount
for Public Libraries**

Grant Program Opportunities

https://www.tsl.texas.gov/ldn/grants/programs

TexShare Card Program

Imagine a Library as Big As Texas!
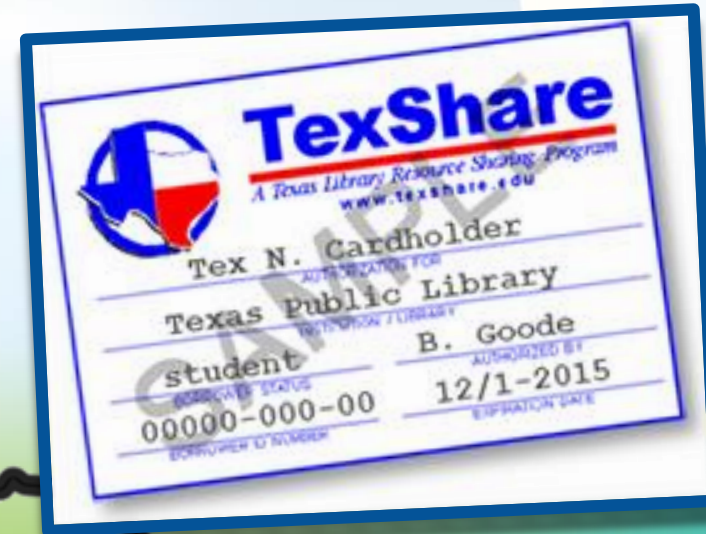
https://www.tsl.texas.gov/texshare/card

TexShare Databases

Other Funding Opportunities
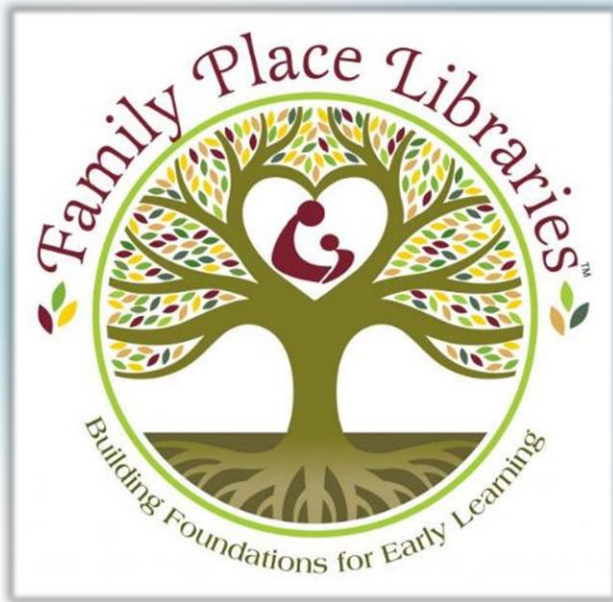
Library Technology Academy

https://www.tsl.texas.gov/ldn/familyplace

https://www.tsl.texas.gov/ld/tech/managingtech

Basic Information

....every library director needs to know!

Legal establishment of library

Who is its governing authority?

City

County

Non-Profit Corporation

Library District

Lockhart County Courthouse
CC BY-SA 3.0

Legal Establishment of Texas Public Libraries

- City 57%
- County 19%
- Non-profit 17%
- Library District 3%
- Multi-jurisdictional 2%
- City-County 2%
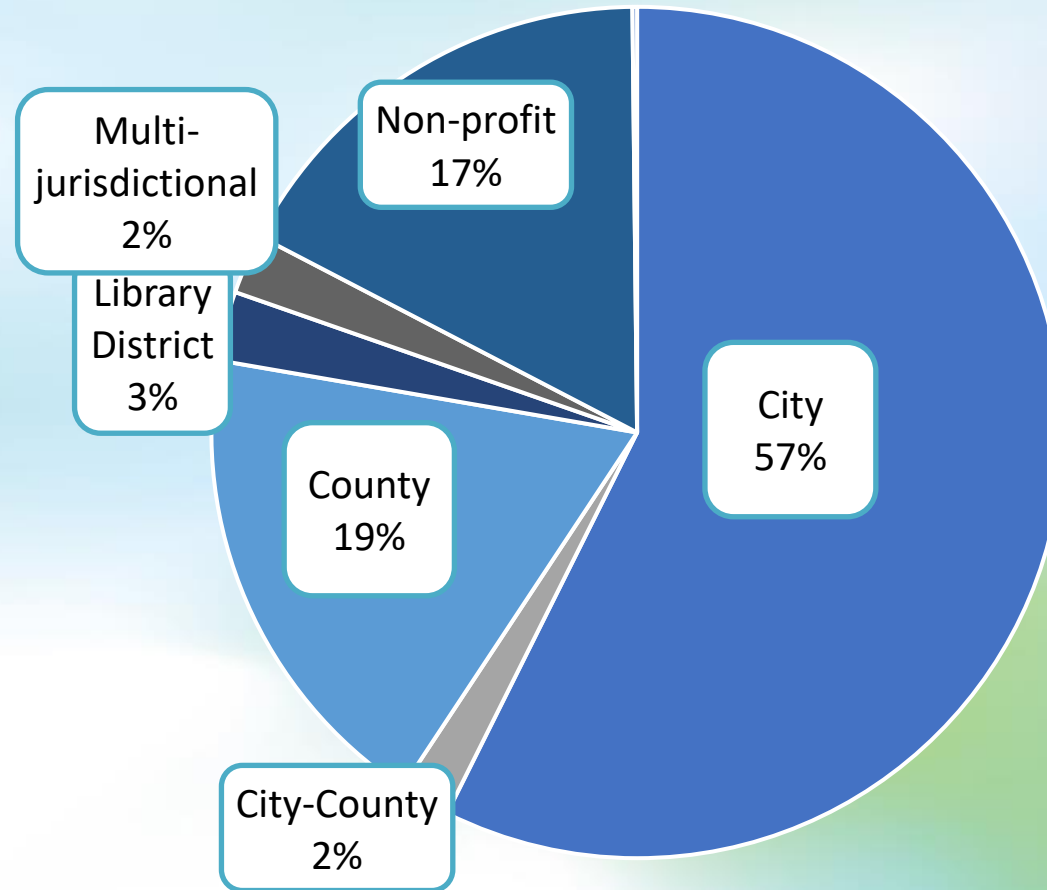
Reporting year

Use local governing authority's year

    City: varies
    County: Oct to Sept
    Non-Profit Corporation: half Jan to Dec
    Library District: varies

Local fiscal year contains **Jan 1**, 2021

Report amounts as accurate on the last day of the local fiscal year.

Signing Authority

sig·na·to·ry /ˈsignəˌtôrē/ : *Person who binds himself or herself, or the entity he or she is authorized to represent, by his or her signature to the terms of an agreement.* http://www.businessdictionary.com/

Legal Establishment	Signatory*
City	Mayor City Manager/City Administrator Finance or Accounting Director
County	County Judge County Auditor
School District	Superintendent Finance or Accounting Director
Non-Profit Corporation	Library Board Chair or Treasurer
Library District	Library Board Chair or Treasurer

Legal establishment – Non-profits

Current contract with each local government funding source to provide free public library services

geralt/pixabay

Population Assignment

VGreenwood 2021

Formulaic - NOT based on geography.

Assigned by sources of local government funding: city, county, school district, according to 13 TAC §1.71.

Uses recent US Census data as a basis.

http://tinyurl.com/PopSrvd

Log-in credentials/succession planning

Website

Email

ILS

Security System

???

Everyday basics/Unsplash

Edge Assessment

http://www.libraryedge.org/

National coalition of libraries, local government and non-profits.

Provides tool which aligns technology to community priorities.

Guides libraries to set goals for digital inclusion

TSLAC goal: 100% Texas Public Library participation

Contact Technology Consultant Cindy Fisher
cfisher@tsl.texas.gov; 512-463-4855

Library Development and Networking Calendar of Important Dates

JANUARY	FEBRUARY	MARCH	APRIL

Early Jan– Late Mar
E-rate initial application window

November – February (dates may change)
Competitive Grant application window

Mar - May
Family Place Training

Mid-Apr – Mid-July
ILL Reimbursement application

Jan 3rd – Apr 30th **Texas Public Libraries Annual Report** submission window

MAY	JUNE	JULY	AUGUST

August 31st End of State Fiscal Year

Mar - May
Family Place Training

Mid-Apr – Mid-July
ILL Reimbursement application window

Mid-Aug – Mid-Sept
Summer Reading Program Survey

SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER

September 1st Start of State Fiscal Year

End of Aug –Early Sept
TexShare Card Usage Report

Oct - Nov
Family Place Training

Early Nov – Mid-Dec
Family Place Libraries application window

Mid-Aug – Mid-Sept
Summer Reading Program Survey

Mid-Oct – Mid-Nov
Summer Reading Program Order Form Open

November – February (dates may change)
Competitive Grant application window

End of Aug –Early Oct
TexShare Database Invoices

Early Nov – Mid-Dec
TexShare Annual Report

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Financial Information

Sections 3, 4 and 5 on the Annual Report

Operating vs Capital

Operating Expenditures

Day-to-day operation of library

Capital Expenditures*

Major one-time projects or costs that exceed local capitalization threshold

*Check with local governing funding authority for capitalization level or local accounting practice.

Operating Expenditures
Staff expenditures

Salaries/wages
Employee Benefits
    Social Security
    Retirement
    Medical Insurance
    Life Insurance
    Disability Income
    Protection
    Unemployment
    Compensation
    Worker's Compensation
    Tuition
    Housing Benefits

Collection Materials

Other Operating Expenditures

Staff Expenditures
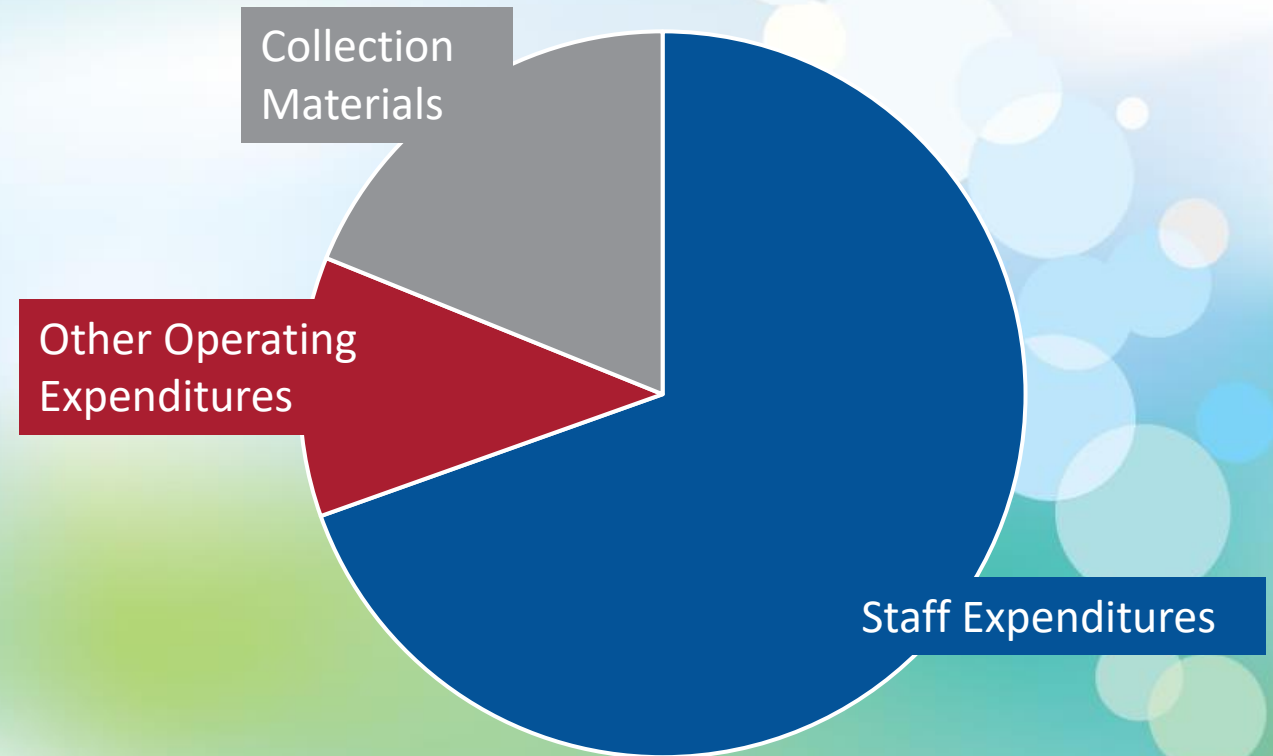
Statewide Percentage Expenditures on 2020 TPLAR

Operating Expenditures
Collection Material expenditures
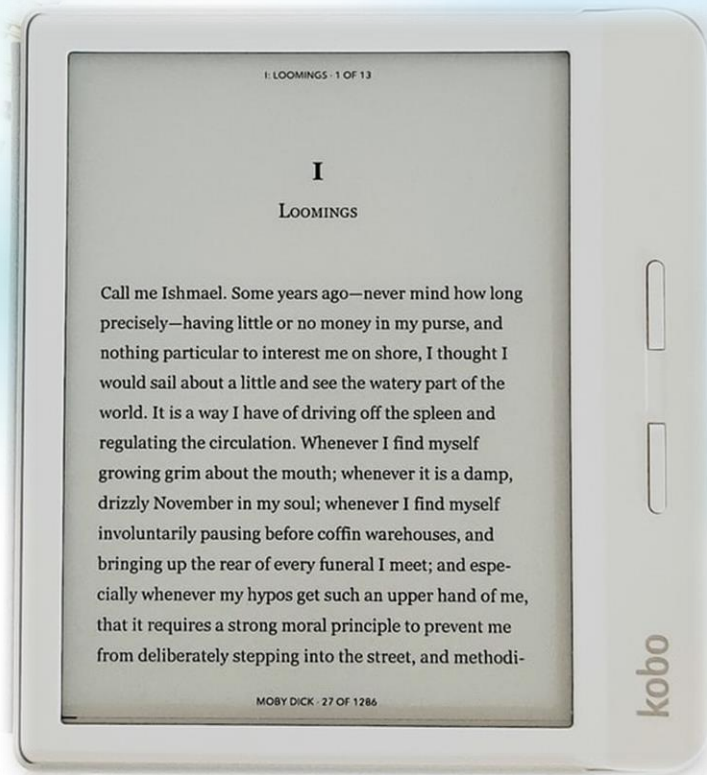
Spencer/Unsplash

Print Materials

Electronic Materials

e-books ∗ audio downloadables ∗ video downloadables ∗ databases ∗ e-serials ∗ any files in digital format

Other Collection Materials

microforms ∗ audio and video physical units ∗ materials in new formats

Operating Expenditures

Other operating expenditures

Binding Supplies

Computer Hardware or Software

Contracts for Services

Consultant Fees

Costs for Library Programs (SRP)

Equipment Repair or Replacement

Legal Fees

Office Supplies

Replacement of Furnishings

TexShare Fees

DevilsApricot/pixabay

Capital Expenditures*

*Check with local governing funding authority for capitalization level or local accounting practice.

- Renovations
- Site Acquisition
- New Buildings
- Opening Day Collection
- Library Automation Systems
- New Vehicles
- One-Time Major Projects
- TSLAC Grants Used For Capital Acquisitions
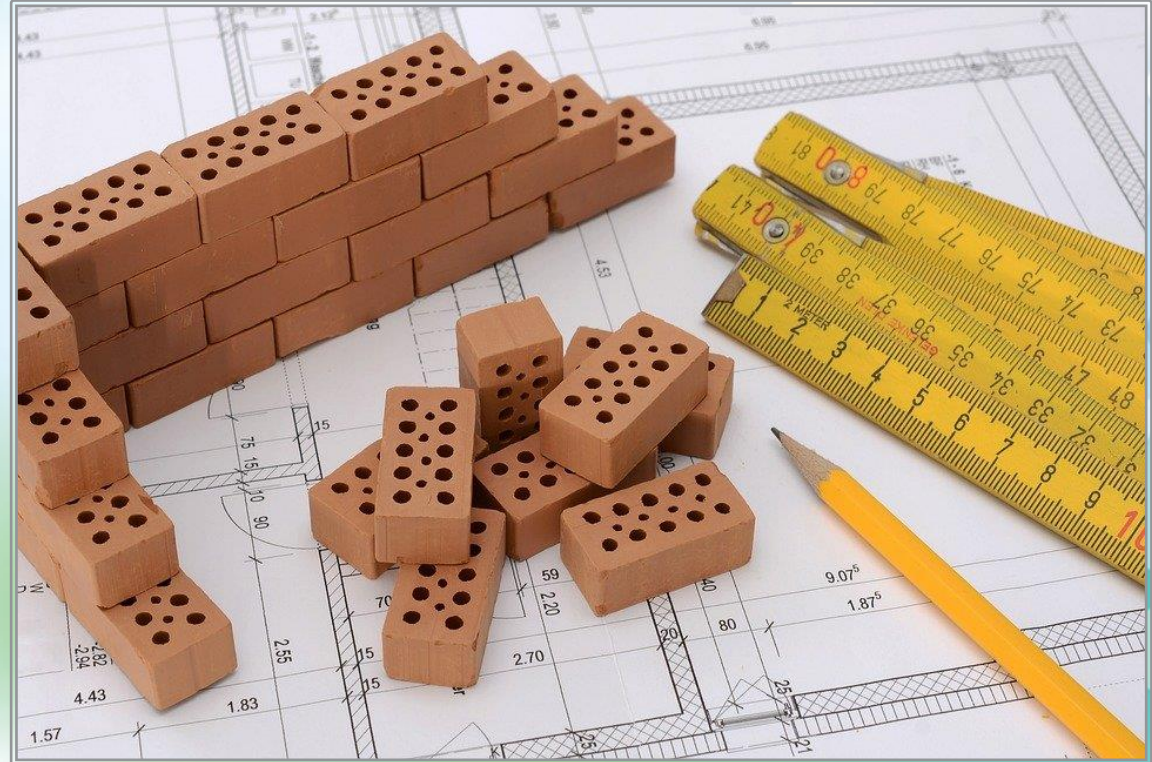
anncapictures/pixabay

Local vs non-local funding

Bucket = <u>Total</u> operating expenditures

Annual totals of day-to-day operation of library

Total Operating Expenditures

Other Operating Expenditures

Collection Material Expenditures

Staff Expenditures
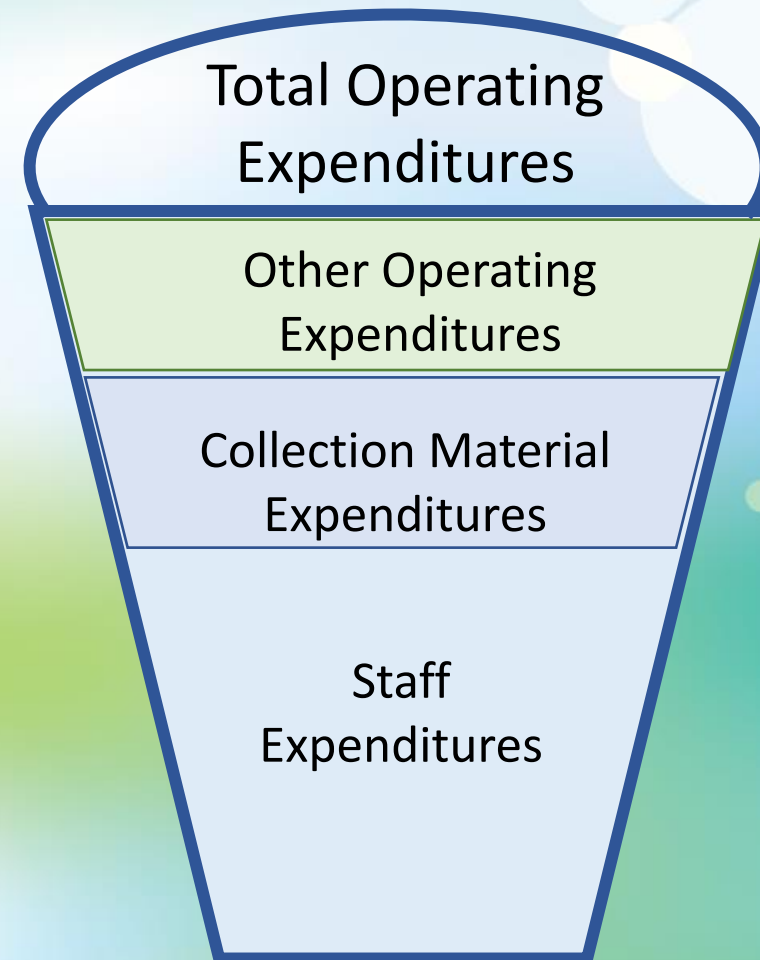
Local vs non-local funding

Sources of funding

Total LOCAL Operating Expenditures

Local Collection Materials Expenditures

Non-local grant funds

Local Government Operating Expenditures

Non-local grant funds
Staff
Collections
Other

Local vs non-local funding

Total LOCAL Operating Expenditures

Local Collection Materials Expenditures

Non-local grant funds

Local Government Operating Expenditures
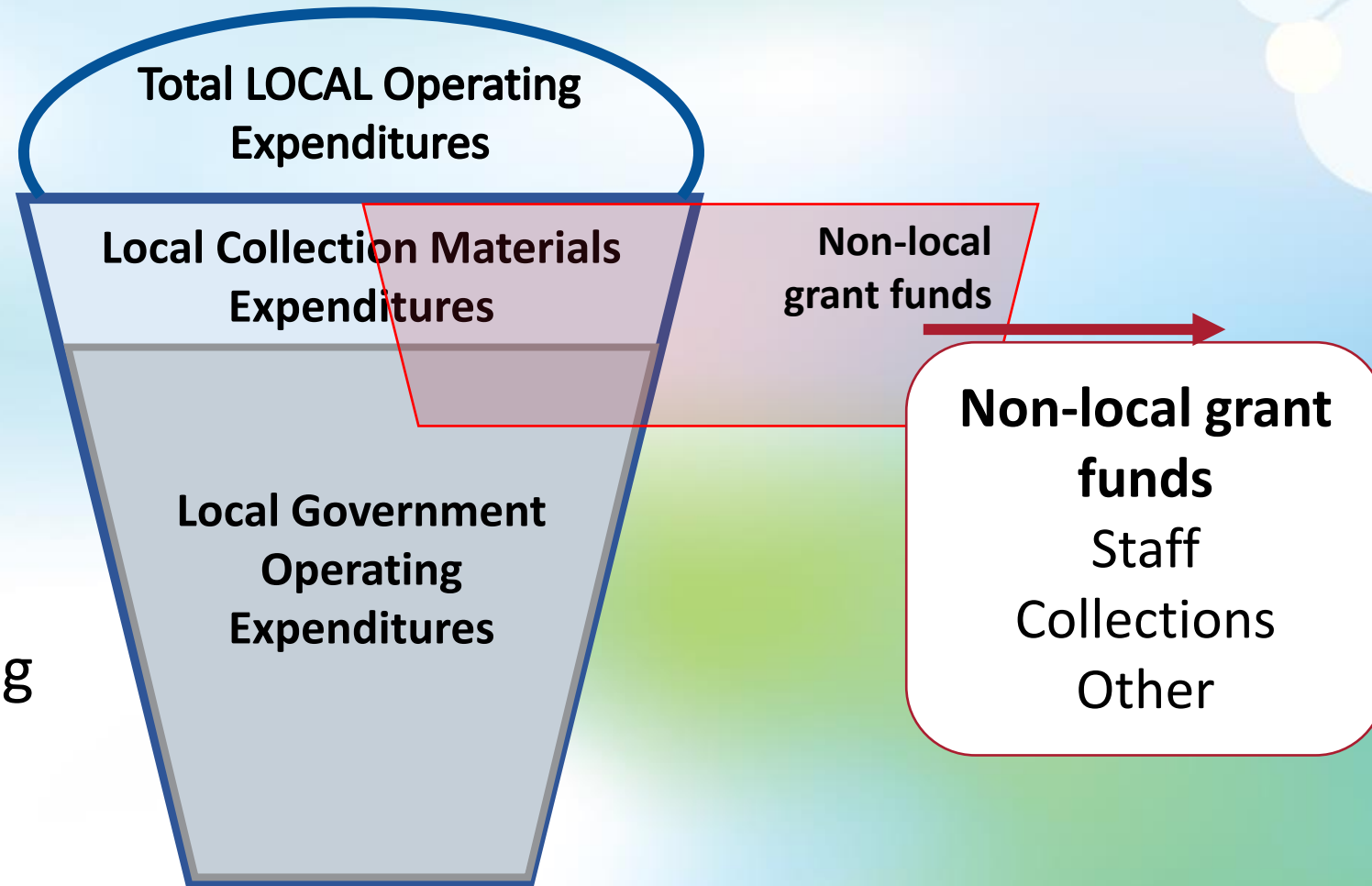
Sources of funding

Non-local grant funds
Staff
Collections
Other

Non-Local Grant Funds

Foundation or Corporate Funds

Federal Funds

State Funds

Local vs non-local funding

Section 4: Local financial effort

Heart and key to accreditation

Dollycathy/pixabay

Local level of financial support that meets or exceeds what has been expended previously…

Total LOCAL Operating Expenditures (4.2)

Local Collection Materials Expenditures (4.1)

Local Government Operating Expenditures (4.3)
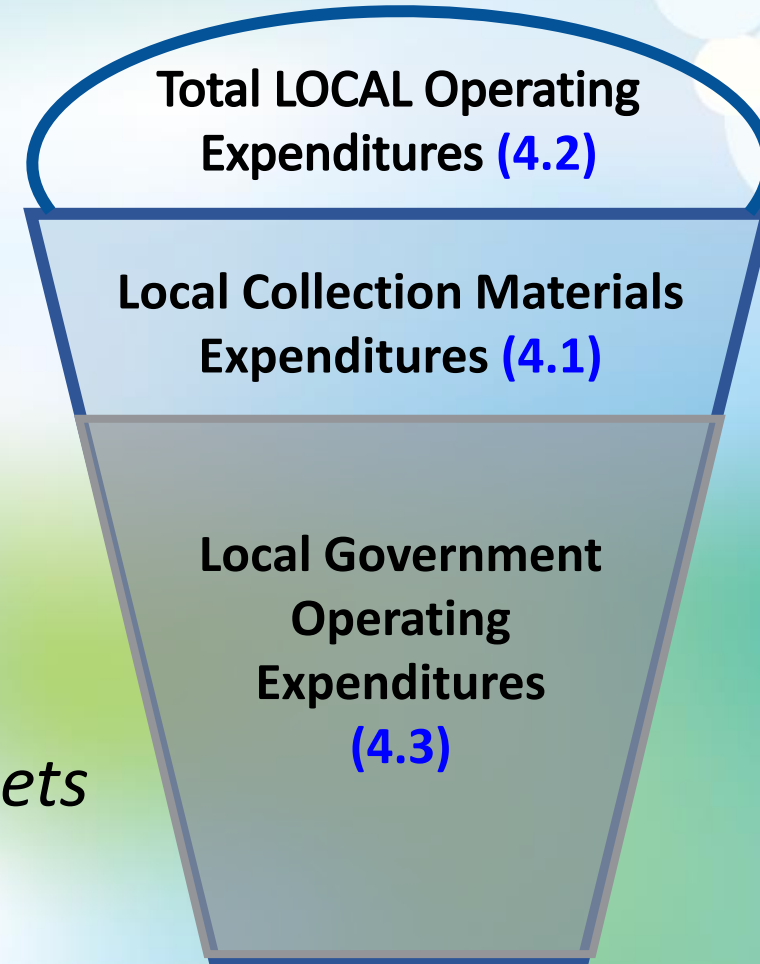
Maintenance of Effort (MOE) – Local Financial Support

2018 – 4.2

2019 – 4.2

2020 – 4.2

÷ 3 = AVERAGE

Dollycathy/pixabay

...meets or exceeds the three-year average of locally-funded operating expenditures

Neil Thomas/Unsplash

Maintenance of Effort

- Two ways to calculate: library meets lower amount.

- Can include indirect support in local operating costs, if needed

- New Emergency Rule adopted for situations beyond library control

- Appeal process in place for loss of accreditation
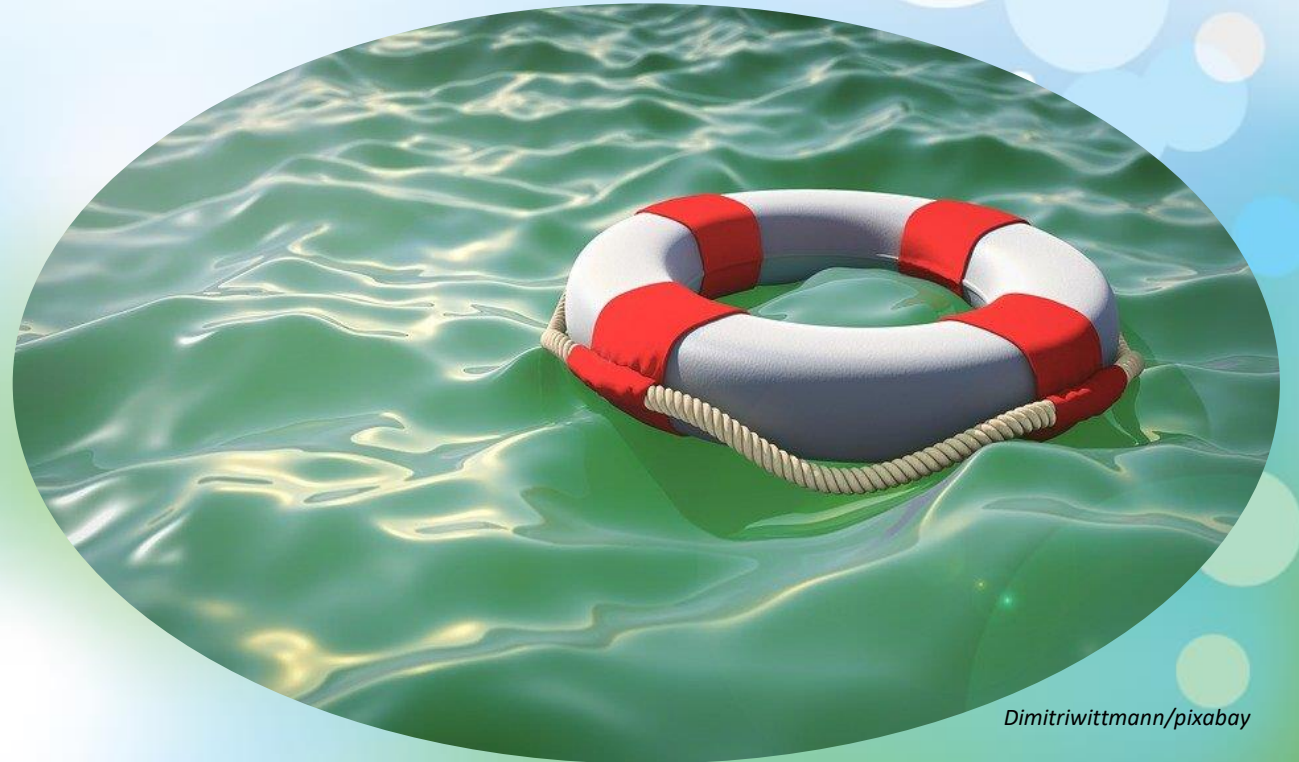
Dimitriwittmann/pixabay

Per capita minimums

Population Assignment	2019 to 2021	2022 to 2024
Fewer than 5,000	$3.85	$3.92
5,001 – 10,000	$4.19	$4.21
10,001 – 25,000	$4.42	$4.51
25,001 – 50,000	$5.52	$5.63
50,001 – 100,000	$8.32	$8.48
100,001 – 200,000	$9.98	$10.18
200,001 – 500,000	$12.07	$12.13
Greater than 500,000	$13.96	$14.03

Reporting Services

Circulation, Programs, Technology, Service Hours, Pandemic Response

Counting the Collection

Physical Items

- Books and other printed items

- Audio materials (sound recordings)

- Video materials (Moving picture recordings)

- **Other** physical materials

    - Tools
    - Cake pans
    - Wi-Fi hotspots
    - Bicycles

NEW!!

Freestocks/Unsplash

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Counting the Collection

E-materials

- E-books

- Audio streaming or downloadable units

- Video streaming or downloadable units

Do not report E-Read Texas or TexShare holdings

Count anything to which your library's patrons have access, including items offered through a consortium.

Geralt/pixabay

Reporting E-Materials (Downloadables)

Reporting E-Materials (Digital/Downloadable)
2021 Texas Public Libraries Annual Report
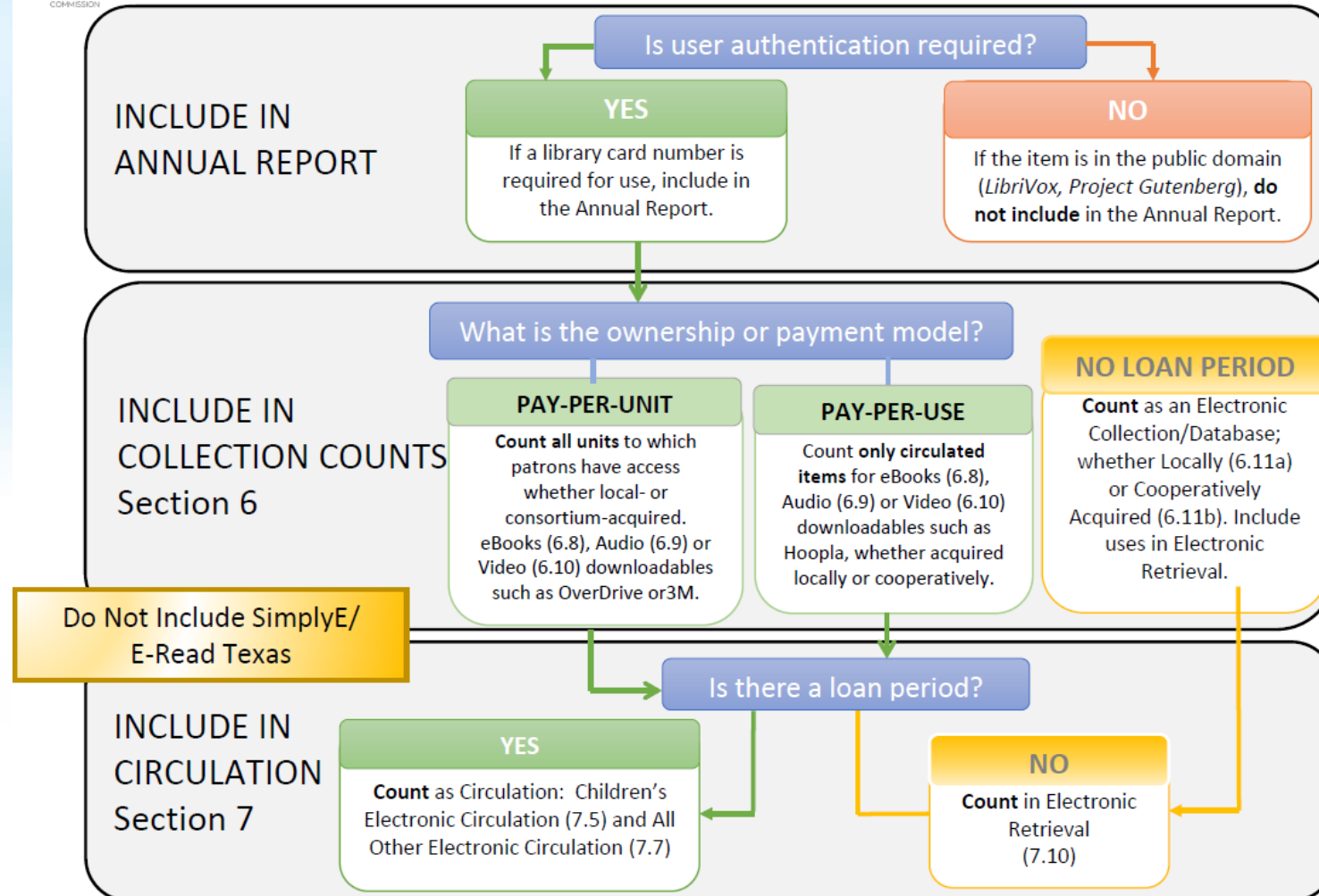
E-Materials

INCLUDE IN ANNUAL REPORT?

Is user authentication required?

YES

If a library card number is required for use, include in the Annual Report.

NO

If the item is in the public domain (LibriVox, Project Gutenberg), **do not include** in the Annual Report.
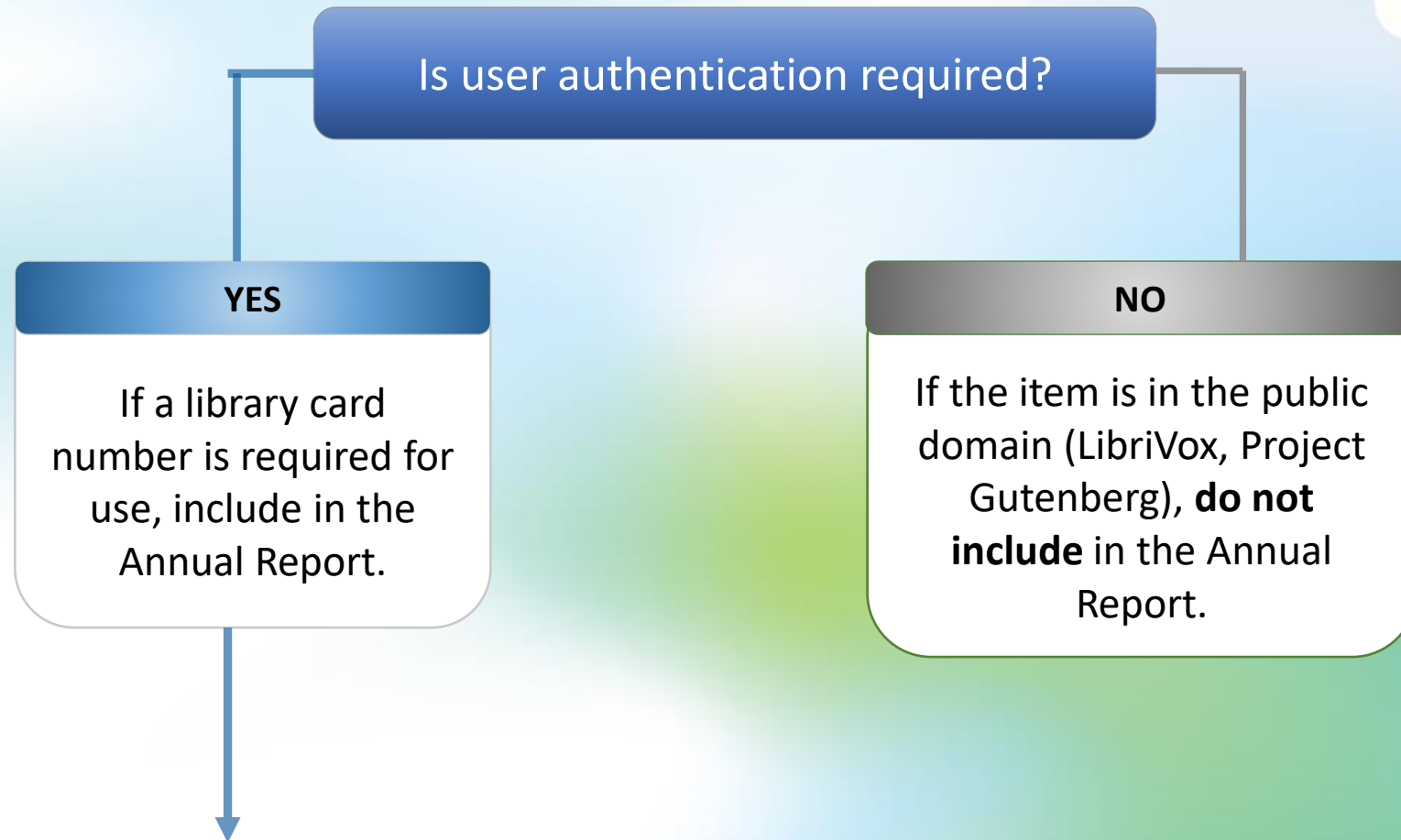
E-Materials

INCLUDE IN COLLECTION COUNTS?

What is the ownership or payment model?

PAY-PER-UNIT

Count all units to which patrons have access whether local- or consortium-acquired. eBooks, Audio, or Video downloadables such as OverDrive or 3M.

PAY-PER-USE

Count **only circulated items** for eBooks, Audio, or Video downloadables such as Hoopla, whether acquired locally or cooperatively

NO LOAN PERIOD

Count as an Electronic Collection/Database; whether Locally or Cooperatively Acquired. Include uses in Electronic Retrieval.

Do Not Include SimplyE/ E-Read Texas

E-Materials

INCLUDE IN CIRCULATION?

Is there a loan period?

YES

Count as Circulation: Children's Electronic (Digital) Circulation and All Other Electronic (Digital) Circulation

NO

Count in Successful Retrieval of Electronic Information

Do Not Include SimplyE/ E-Read Texas

Circulation - Categories

Include only your library's patrons

Children's Physical Materials (Age 11 and younger)	**Children's E-Materials** (Age 11 and younger)
All other ages Physical Materials	All Other Ages E-Materials

Circulation of Other Physical Items

Programs and Program Attendance

Joshua Eckstein/Unsplash

What counts as a program?

- Sponsored or co-sponsored by the library

- Planned event: something that would be published on the library's calendar of events

- Introduces group to broad range of library services

- May provide cultural, recreational, educational information

Programs and Program Attendance

Peggy_Marco/pixabay

Do not count as a program:

- Library Board meetings
- Business meeting at library
- Polling place voters in library
- Library booth at festival or parade

7089643/pixabay

Programs and Program Attendance

Do not count as a program:

- One-on-one tutoring or other training

- Non-profit volunteers tutoring

- Home delivery service

- Any self-directed or "passive" programming such as craft kits, reading bags, story walks, etc.

Programs and Program Attendance

Location of event

Live, in-person **on-site**

V.Greenwood, 2018

Programs and Program Attendance

Location of event

Live, in-person, **off-site**

Gautam Arora/Unsplash

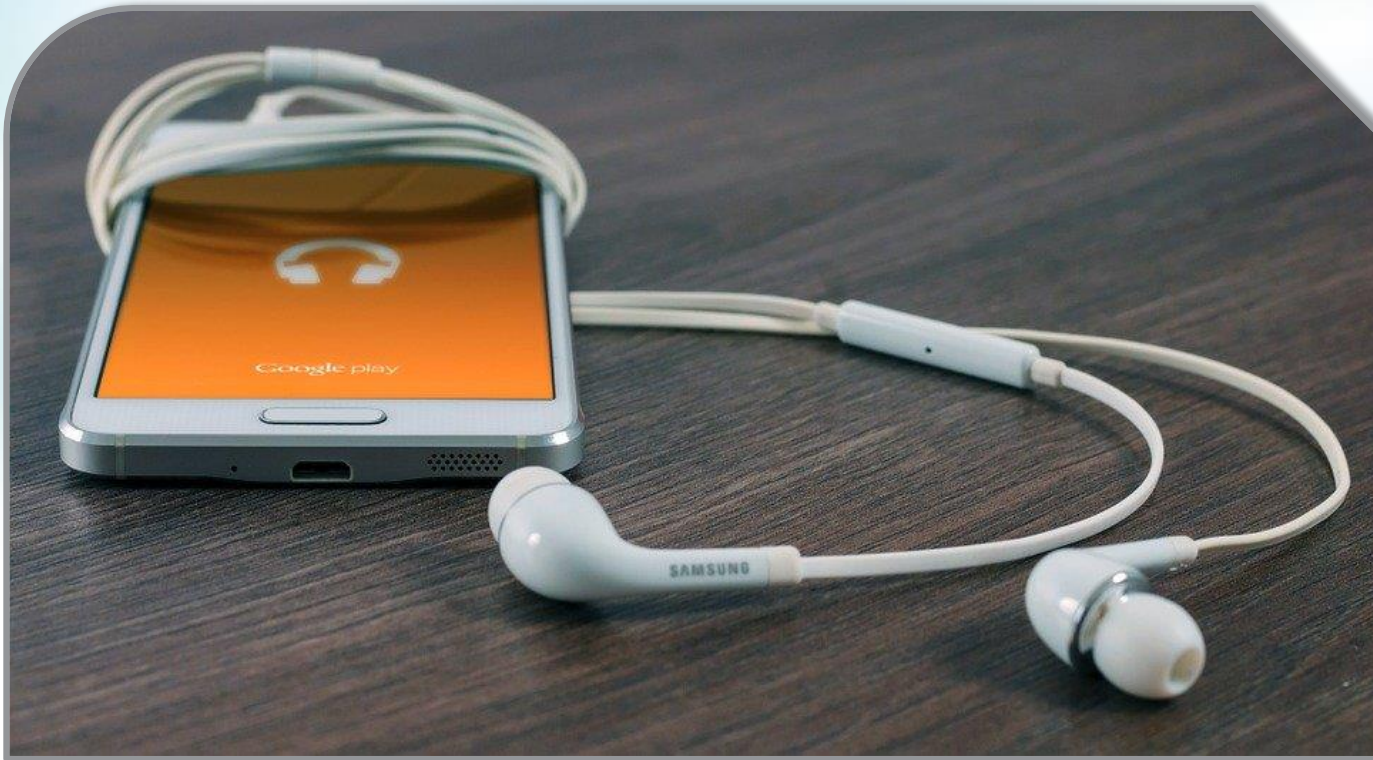# Programs and Program Attendance

Location of event

Live **virtual**

Chris Montgomery/Unsplash

Programs and Program Attendance

Firmbee/Pixabay

Location of event

Recordings

Programs and Program Attendance

2020 Program Questions

Programs Targeting Children

geralt/pixabay

2021 Program Questions

Programs Targeting Children

Ages Birth – 5 years

Ages 6 – 11 years

NEW!!

Programs and Program Attendance

2020 Program Questions

Programs Targeting Young Adults (YA) Ages 12- 18 years

Programs Targeting Adults 19+ years

2021 Program Questions

Programs Targeting Young Adults (YA) Ages 12- 18 years

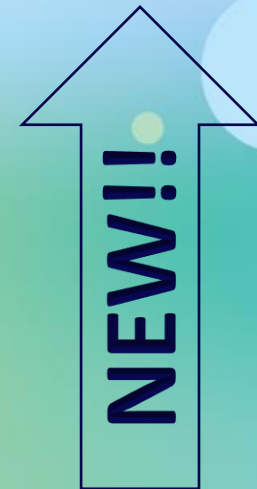Programs Targeting Adults 19+ years

geralt/pixabay

Programs and Program Attendance

2020 Program Questions

2021 Program Questions

Programs of General Interest

NEW!!

geralt/pixabay

Programs and Program Attendance

Target Age Group for Program	Live, In-Person On-Site Session		Live, In-Person Off-Site Session		Live Virtual Session		Recorded Session	
	Programs	Attendees	Programs	Attendees	Programs	Attendees	Programs	Attendees
Early Childhood (Birth-age 5)								
Children (6-11)								
Young Adult (12-18)								
Adult (19+)								
General Interest								
TOTALS								
	Live (Synchronous) Programs						Recorded	

Wi-fi Sessions

Report from Library Router

Administrative interface that comes with wireless access point, router, or firewall.

Put a counter on a welcome (splash) page that user sees before gaining access.

Samuel1983/pixabay
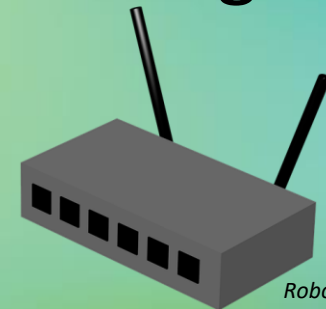
RoboxInvasion/pixabay

Technology

Website visits

Report from Analytic Software
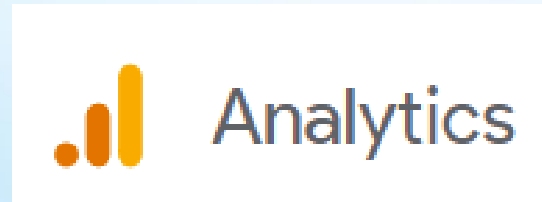
"View" or "session" is user connecting to the library's website for any length of time, purpose, or number of pages or elements viewed.

Service hours

Leyre Labarga/Unsplash

Facility is unlocked and available to patrons

Full service provided

May have limited occupancy and/or mask restrictions

May have limited hours

May restrict number of patrons inside

May have restrictions on useable areas.

Report actual hours and weeks open;
report weeks of limited occupancy.

Service hours

Curbside-only delivery

Service by appointment
 (doors locked)

Drive-through service

Remote reference
(phone, email, website, etc)

Tim Mossholder/Unsplash
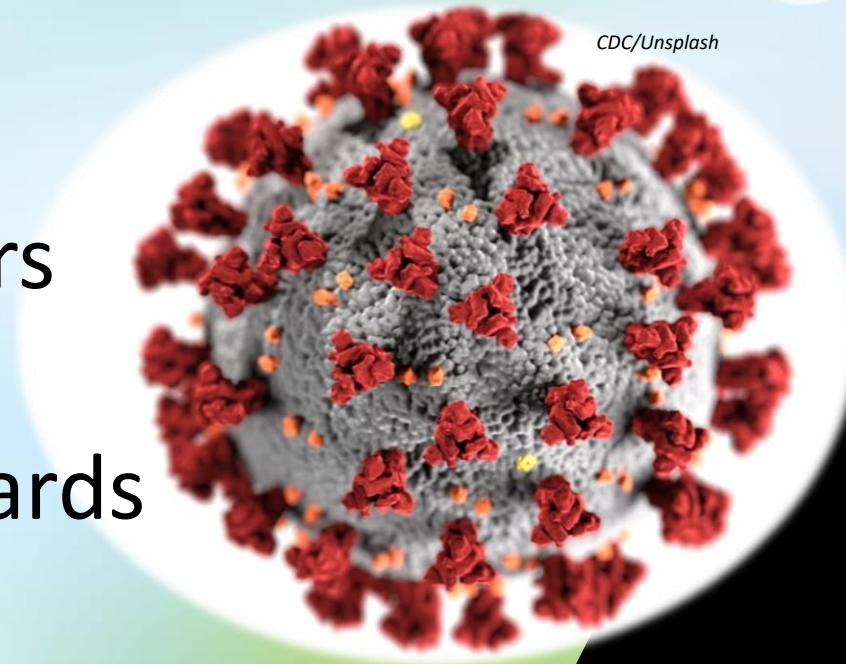
Report number of weeks closed.

Accreditation Hours

Report <u>regular</u> weekly service hours with no pandemic restrictions in place

Special Pandemic Section

Facility Service Hours
Services Offered
Electronic Library Cards
Wi-Fi Access
Staff Re-assigned

CDC/Unsplash

KlausHausmann/pixabay

Submission Information

Timeline and last steps

Due Date

13 TAC §1.85 Annual Report

A public library shall file a current and complete annual report with the Texas State Library and Archives Commission by April 30. Revisions to the annual report which would affect membership status for the next fiscal year will not be accepted after July 31...Willful falsification of annual reports shall cause the library to be disqualified for one year in the first instance and disqualified for three years in the second instance.

APRIL
30

Clker-Free-Vector-Images/pixabay

Application for Accreditation

Last page of the Annual Report

Can be used to request waiver

Email to accreditation@tsl.texas.gov

Report submission is not complete until form is received!

ACCREDITATION IN STATE LIBRARY SYSTEM
APPLICATION
Local Fiscal Year 2021

CITY _____

LIBRARY NAME _____

This authorization for application should only be completed if the library is applying for membership in the Texas Library System for State fiscal year 2023, Sept 1, 2022 – Aug 31, 2023. It must be submitted as part of its 2021 Annual Report on or before April 30, 2022, if the library is applying for accreditation.

The below signed certify, to the best of their ability, that the information contained in this Annual Report is complete and accurate for local fiscal year 2021.

	Signature
Governing Authority*	
	Date
Printed Name and Title	
Library Director	Signature
	Date
Printed Name	
Library Board Chair	Signature
	Date
Printed Name	

* All applicable signatures are necessary, based on library's legal establishment. Signatures of the City Secretary, County Clerk or similar positions are not valid substitutions for the signatures of Mayor, City Manager or County Judge. Electronic signatures are acceptable.
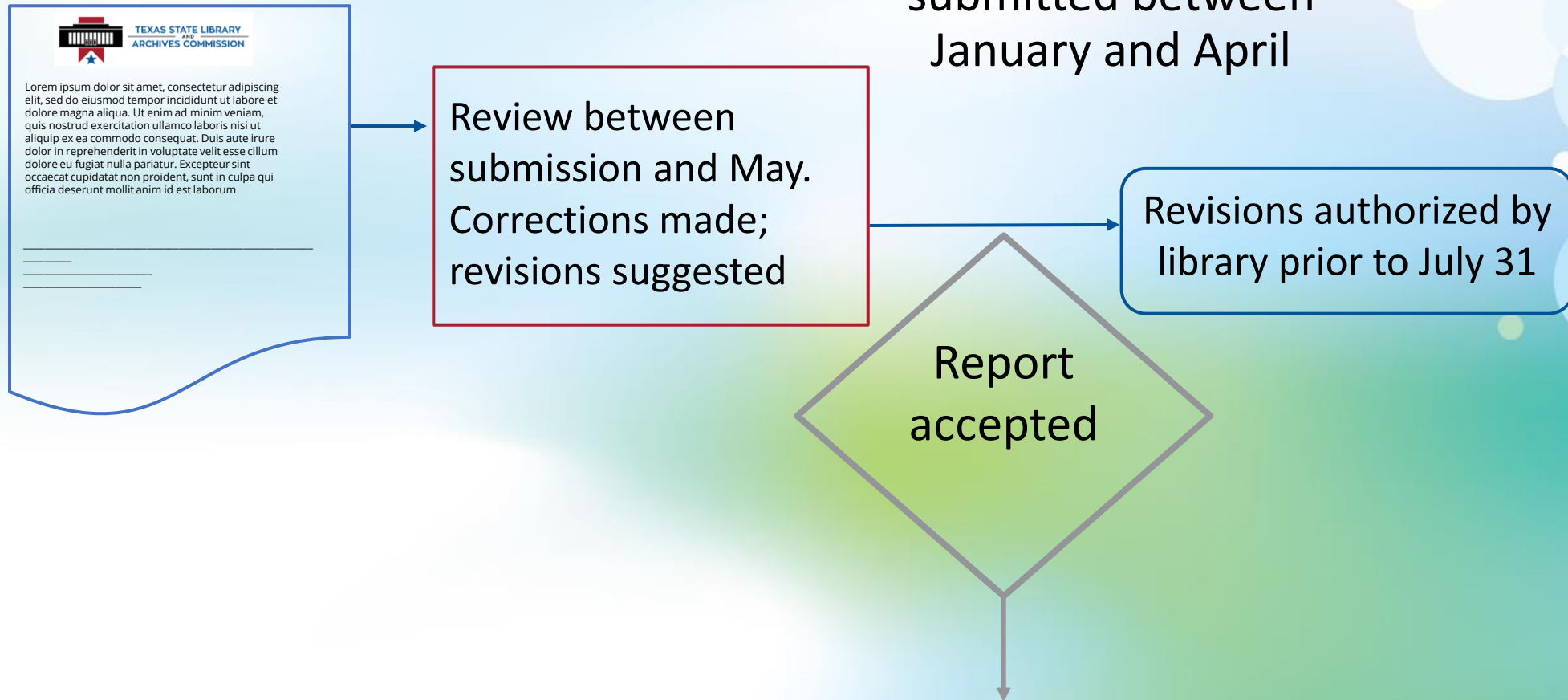
Check one:
☐ The library has met all minimum standards of library accreditation.
☐ The library has **not** met all minimum standards of library accreditation.
To prevent hardship to libraries and their communities due to the current community health situation, the ... per 13 TAC §1.71-§1.85.
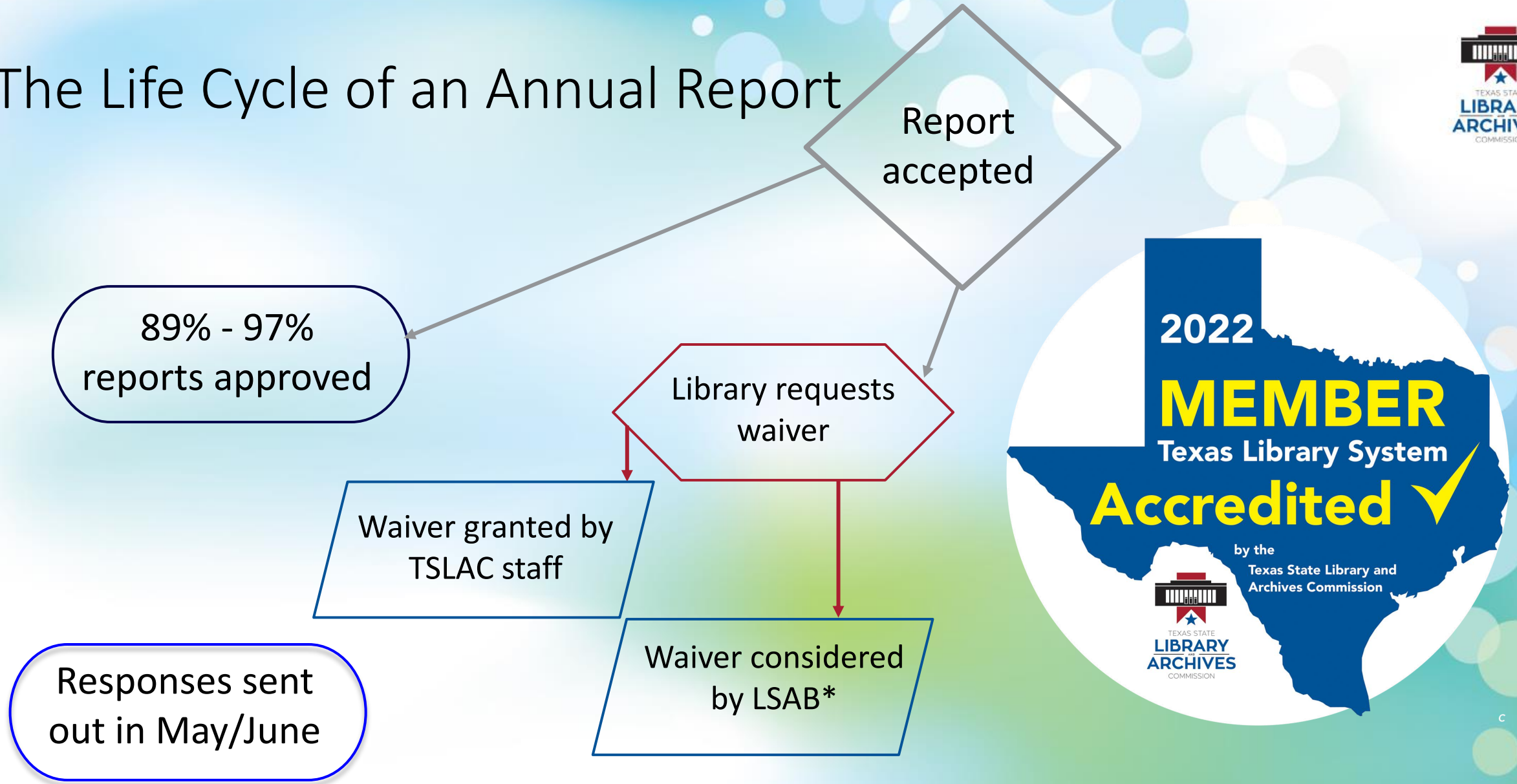
The Life Cycle of an Annual Report

Over 500 reports submitted between January and April

Review between submission and May. Corrections made; revisions suggested

Revisions authorized by library prior to July 31

Report accepted

The Life Cycle of an Annual Report

Report accepted

89% - 97% reports approved

Library requests waiver

Waiver granted by TSLAC staff

Waiver considered by LSAB*

Responses sent out in May/June

*Library System Act Advisory Board

2022 MEMBER Texas Library System Accredited ✓
by the Texas State Library and Archives Commission

Questions

Thank you!

You've got this!

Valicia Greenwood, Library Data Coordinator
Library Development and Networking Division
Texas State Library and Archives Commission
vgreenwood@tsl.texas.gov   512-463-5466 800-252-9386 (toll-free in Texas)